



## Reviewers' Instructions

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### Introduction

Thank you for volunteering your time to score funding applications for the Portland Children's Levy. Reviewers have a crucial role in helping determine how the Levy will invest \$68 million for the city's children and families.

Please read the following instructions on reviewing and scoring applications before you start the scoring process. If you have any questions or are unclear on any aspect of the reviewing process, **please call or email staff in your program area:**

<b><i>After School and Hunger Relief</i></b> Lisa Pellegrino	503-823-2939 or 503-740-1993 <a href="mailto:lisa.pellegrino@portlandoregon.gov">lisa.pellegrino@portlandoregon.gov</a>
<b><i>Early Childhood and Mentoring</i></b> Meg McElroy	503-865-6013 <a href="mailto:meg.mcelroy@portlandoregon.gov">meg.mcelroy@portlandoregon.gov</a>
<b><i>Child Abuse Prevention &amp; Intervention and Foster Care</i></b> Lisa Hansell	503-865-6061 <a href="mailto:lisa.hansell@portlandoregon.gov">lisa.hansell@portlandoregon.gov</a>

### Documents Included in Packet

The following documents should be in your packet:

- Reviewer Instructions
- Bias Awareness Training handout
- List of Funding Applications Assigned to Review
- Conflict of Interest Statement
- Portland Children's Levy Request for Investment (RFI) for your program area
- Practice Scoring Materials – Exercise 1 & Exercise 2
- Stipend Instructions & Forms
- Funding Applications
- Application Scoring Form for each application

### Volunteer Grant Reviewer Responsibilities and Time Commitment

- Attend the reviewer training to learn how to review and score applications (2.5 hours)
- Independently review and score grant applications using the scoring criteria provided by PCL. Estimate 8-10 grant applications per reviewer, with a total of 160-200 pages of information, to be read, reviewed, and scored between 12/4/19 and 1/21/20 (24-30 hours)
- Contact PCL staff for direction if you have questions during the review process
- Phone check-in with PCL staff mid-way through the review process (15-20 minutes)
- Meet with PCL staff to submit and review your completed score sheets and provide feedback, via a survey, about ways to strengthen the grant application review process (30-45 minutes)

### **Conflict of Interest Statement**

You must complete the Evaluator's Statement of Independence and Non-Conflict of Interest form and declare that you do not have a conflict of interest in performing the application review duties. A conflict of interest is defined as a situation in which a reviewer has, or appears to have, a financial or familial relationship with an applicant. If you believe you have a conflict of interest in scoring any of the applications we assigned to you, let us know as soon as possible. Complete and submit your completed conflict of interest form at the reviewer orientation session. Staff must retain a copy for our records.

### **Confidentiality**

Every aspect of the review of applications is considered confidential; therefore, nothing should be discussed regarding the applications outside the confines of your conversations with Levy staff. Do not communicate directly with applicants regarding the application. If clarifications are needed regarding a proposal, please contact your assigned Levy staff person.

### **Bias Awareness**

We know that grant reviewing is not scientific. PCL recognizes that public grant processes have their own biases, however we have structured our process informed by equity practice in grantmaking to the extent possible. As such, we ask that you be aware of how your biases can impact the review process. Please read the Bias Awareness Training for Volunteer Grant Reviewers before you begin reviewing applications.

### **Request for Investment Document**

Please familiarize yourself with the Request for Investment (RFI) before trying to score any applications. This document includes a summary cover sheet, RFI instructions, and three sections of questions that applicants must answer. Be sure to review the Program Area Strategies specified in the funding Part 1 of the RFI instructions. Applicants are required to address at least one strategy in their application.

### **Funding Applications**

Each application contains 3 main parts:

- Coversheet and narrative responses to 3 sections of the RFI (using Exhibit A to the RFI)
- Table I (using the Exhibit B from the RFI)
- Program Budget for 2020-21 (using Exhibit C from the RFI)

Please note that narrative responses are limited to the number of pages specified for each section of the RFI. Some applicants provided footers on their applications that do not align with page limit requirements. PCL staff checked and verified that each application met page limit requirements so you do not need to check page limits or review footer page numbering. Staff will assure that other application requirements are met (e.g. financial review, audits, 501 c 3 status).

### **Review Groups and Reviewer Numbers**

Each of you is part of a group of reviewers reviewing the same set of applications, and each reviewer has been assigned a reviewer number. Your reviewer number is on the label on the front of your packet. Reviewers will independently score each application and will not meet as a group to discuss the applications.

A Review and Scoring Form must be completed for each application you have been assigned to review. You may complete either the electronic or paper version of the scoring form. For copies of electronic forms in the program area of applications you're reviewing, contact your assigned PCL staff member.

Write the application number and your reviewer number on each scoring form. Do not put your name on the scoring forms, since the names of reviewers are normally not released to applicants.

### **Scoring Applications**

Read, evaluate and score each application on your own using the Review and Scoring Form provided.

Keep these things in mind when scoring:

- Recognize your biases, then mitigate them
- Be as objective as possible
- Focus on content - evaluate solely on the information contained in the application.
- Rate applicants using the scoring criteria – not against one another
- Do not make assumptions
- If you have questions or need clarification, please contact your assigned Levy staff member

The Review and Scoring Form follows each of the main sections of the RFI and each lettered sub-section. The form lists the total point value of the entire section, the point values for each lettered sub-section and is further broken down to include scores for multiple elements within each sub-section.

In order to earn the maximum points listed for each sub-section, the applicant's response must include all of the elements listed on the scoring form for each sub-section. You may award full or half points in your scoring (e.g. 0.5, 1, 1.5, 2), but do not award quarter points or other fractions.

Do not score a 0 if the applicant provided at least some of the information requested. If you assign a score of "0" to any section, you must note specific characteristics or deficiencies in the Notes section of the form to substantiate that score.

Please total the points awarded for each of the three main sections.

Applicants will receive copies of their score forms before funding decisions are made. Please write comments in the spaces provided on the scoring forms to help applicants understand the scores. Constructive feedback from reviewers can help organizations improve their grant writing.

Your scores for each section of the RFI will be averaged with the scores of the other reviewers who are reviewing the same applications. For organizations that submit multiple applications, Section I scores will be an average of the scores from all reviewers who scored an application from that organization. An applicant's total score will be a total sum of the averaged scores for each of the three sections.

### **Mid-Point Check-in**

In early January, Levy staff will contact you to check-in on your progress in reviewing and scoring applications. Staff will answer questions and provide support as needed. We will also schedule a time to meet with you at the end of January to collect score sheets and debrief the review process. You are welcome to contact staff anytime you have a question, no need to hold your questions until the mid-point check-in.

### **Meet with Assigned Levy Staff**

Between 1/21/20 and 1/31/20, Levy staff will meet with you to check your completed score sheets. If you are using an electronic version of the scoring form, we will ask you to send it to us prior to our meeting. We will also request feedback on the review process and your experience as a reviewer. The meeting is estimated to take 30-45 minutes.

**Stipends**

Reviewers are eligible to receive a stipend of \$25 per application scored if the review is done outside of paid work time. All reviewers need to complete the stipend form and indicate whether they request or waive the stipend. Those requesting a stipend may choose a cash payment or a gift card. Additional paperwork is required depending on the stipend option selected (see Reviewer Stipend Instructions).

**What Happens After Applications are Scored?**

After reviewers have scored applications, staff will make funding recommendations to the Allocation Committee based on a balance of scores, funding priorities, geographic distribution, culturally specific programming, past performance and other policy considerations. The Allocation Committee will make funding decisions at two meetings in April 2020. They will make funding decisions based on application scores, staff recommendations, written and video testimony of applicants and policy considerations including location of services, adequacy of services to priority populations, feasibility of activities and cost to foster a balanced and integrated citywide system of services. The Allocation Committee's funding decisions will then be submitted for final approval by the Portland City Council.

**Thanks again** for being an important part of the review process. Please be in touch if you have any questions.